

WYLD TECHNOTE 110: Updating Library Ownership (Overlaying) of patron records

*The following procedures apply to public libraries in the ILS Users Group. Colleges, schools, and special libraries may have legitimate reasons for maintaining duplicate records and their records **should not** be edited*

WYLD users may have library cards at more than one library in Wyoming. It is common practice to update a library user record by changing the patron's home library and other locally specific information. These steps are often referred to as changing ownership or 'overlaying' of the record. In the ILS Users Group, public libraries should adhere to the procedures described below when updating a record.

When registering a new patron, library staff should check to see if a record already exists by searching for the patron's name in Workflows (Display User wizard). The search properties should be set to search the entire state, and not limited to the current library. To ensure that only public library records are edited, make sure that the **profile policy names** are 01 thru 23 or ALBY.

Recommended steps to take ownership of an existing WYLD patron record:

- Be sure the record you want to overlay belongs to the same person who is registering in your library. Ask the patron whether he/she lived at the address listed in the other town.
- Check the old record for fines or overdue materials, display the list by clicking on the **Checkouts Folder**. The [WYLD Card Policy](#) states that libraries will not issue a card for a patron until overdues and fines are returned or paid. Do not issue a new card or overlay an existing card until books are returned and all fines or fees are paid. These must be cleared before you proceed any further. If the patron owes a fine of less than \$5.00, you may collect the fine. If the fine is \$5.00 or more, encourage the patron to write a check to the library where the fine is owed, but cash will also be accepted. Print the bills page before you clear the fines from the patron record using the Paying Bills Wizard.
- Print the patron's current information from the **Modify User** screen by choosing **Print** from the **File menu** at the top of the screen. It is important to print the screen before you change the barcode or other information so that you can notify the original owning library, if necessary.
- Be sure the patron knows that the old card will no longer be valid. You should have the patron's permission to overlay the old record
- Follow your library's procedures for patron registration.
- Change the patron's barcode and other information in **Modify User**.
 1. Bring up the patron's record by searching the name or scan the "old" library card in the Lookup Field.
 2. Position the cursor in the **User ID** field and scan in the new barcode
 3. Update the **Patron Profile**.
 4. Remember to delete any other information that your library does not use (e.g. information stored in the 'demographics' tab.
See [WYLD Consortium: Statewide Borrowers' \(WYLD Card\) Policy section 3](#).
- Notify the original library that you have taken ownership of their patron record. See below for a list of libraries that have asked to be notified when their records are assumed by other libraries.

Contact Marc or Des in the WYLD office to make changes to this list.

Campbell County (and Wright Branch) send email to circ@ccpls.org
Carbon County (and all branches) send email to kjones@carbonlibraries.org
Converse County send email to cinnamon@conversecountylibrary.org
Crook County send email to crookcountylib@rangeweb.net

EWC send email to **Casey.Debus@ewc.wy.edu**

Goshen County send email to **ihoy@GoshenCounty.org**

Natrona County and all branches send email to **reference@natronacountylibrary.org**

Niobrara County send email to **info@niobraracountylibrary.org**

Park County and all branches send email to **psmith@parkcountylibrary.org**

Weston County and all branches send email to **westill@westongov.com**

Uinta County - Lyman send email to **sworthen@uintalibrary.org**